



Medicaid Management Information Systems

Maine Integrated Health Management Solution

Trading Partner Guide for Billing Providers

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1. Introduction

This *Trading Partner Guide for Billing Providers* describes several processes that will be useful to billing providers that want to register as trading partners. The following sections contain a list of the information needed before starting the registration process, as well as, a detailed description of how to complete each of the registration steps.

If the user is not a billing provider that wants to register as a trading partner, refer to the appropriate document in the Trading Partner Guides repository on the MIHMS Health PAS Online Portal (online portal).

2. Information Needed

Before registering as a trading partner, make sure that the following information is readily available:

- Tax ID (FEIN or SSN), the NPI or API, and enrollment case number of the provider's approved MaineCare enrollment application. (A provider may not enroll as a trading partner until their enrollment application is approved.)
- Name, business address, business telephone number, and email address for the person who is completing the trading partner registration. (This information will be used to create the main trading partner account for the provider.)
- (Optional) Tax ID, the NPI or API, and enrollment case number of additional approved enrollment applications for the provider. This information can be affiliated to the main trading partner account to provide a single way to view trading partner information for the provider.
- (Optional) The names and email addresses of additional people to affiliate to the main trading partner account as provider representatives. Provider representatives may be additional parties who work for the provider that may have an interest in such activities as maintaining the provider's enrollment application as business needs change, completing X12 submissions, and so on.

***NOTE:** This information is used to create the trading partner account for the billing provider.*

3. System Requirements

To successfully use all features of the online portal, ensure that computer systems meet the following minimum requirements:

- Reliable online connection
- Web browser – The latest version of Microsoft Internet Explorer is recommended. As new versions of Internet Explorer become available it is recommended that these versions are used.
- The latest version of Adobe Acrobat Reader

4. Complete the Registration Steps

4.1 Choose the Trading Partner Registration Link

Click the **Register** link to access the first Trading Partner registration page. The link is located on the left side of the online portal Provider page- see **Figure 4-1** below.

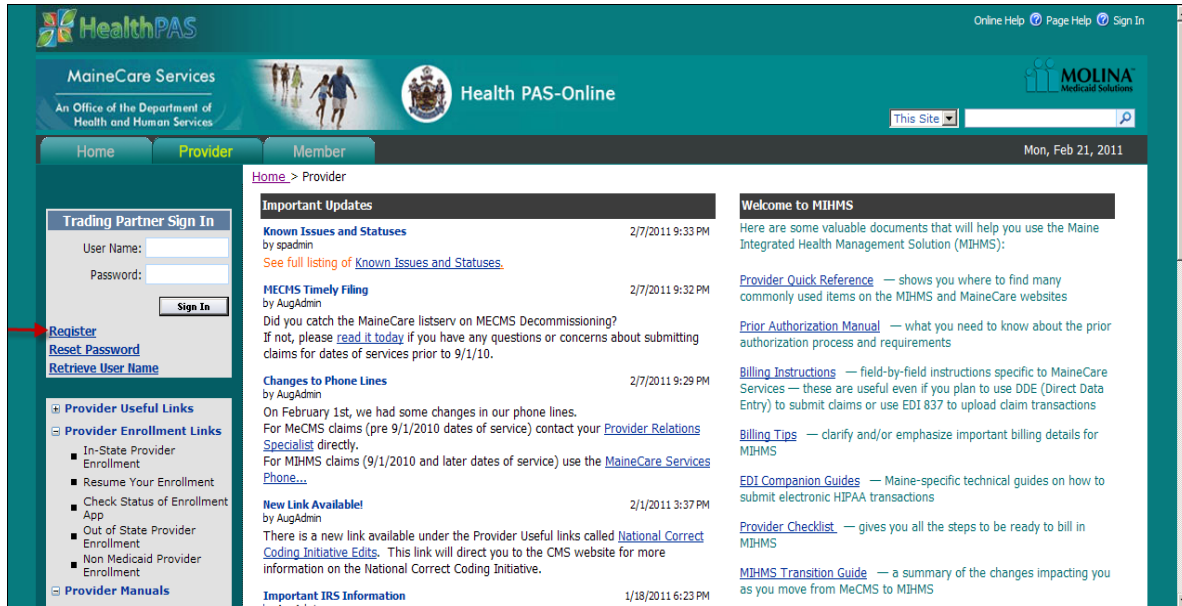


Figure 4-1: Trading Partner Registration

4.2 Provide Demographics Information

The first trading partner window is shown below in **Figure 4-2**. On this window, first select the Provider type of trading partner from the drop down menu.



Figure 4-2: Register As

To complete the demographics window, follow the steps below- see **Figure 4-3**.

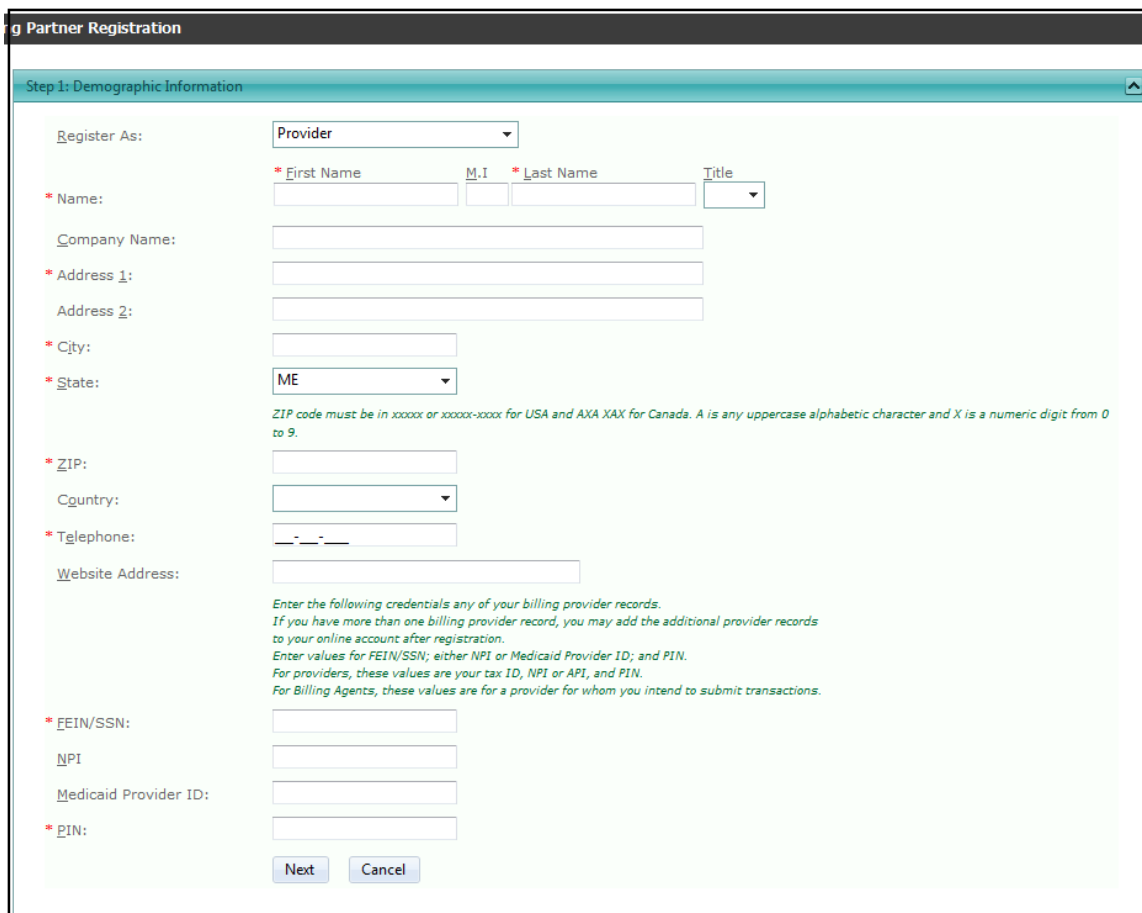


Figure 4-3: Demographics Information

1. In the Name fields, indicate the name of the person completing this registration. First and last names are required; the middle initial and a title are optional.

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- In the Company Name field, indicate the company name. This is an optional field if enrolling as an individual trading partner (Type 1), but it is a required field if enrolling as a (Type 2) organization.
 - Type 1 – are individual providers who render health care (e.g. physicians, dentists, nurses and sole proprietors.)
 - Type 2 Organization – renders health care services, or furnishes health care supplies to patients (e.g. hospitals, home health agencies, ambulance companies, etc.)

NOTE: *If enrolling as a Type 2 organization, the name of the organization as it appears on the W-9 on the line labeled “Name (as shown on the organization’s income tax return)” is required. Refer to the preprinted labels from the IRS on documents such as income tax returns, payroll deposit coupons, or similar filings to verify the name and TIN that the IRS has on file for the entity.*

If the IRS’ information does not match what is entered here, contact them in order to correct the discrepancy before proceeding.

2. In the Address 1 field, indicate the first line of the business address. This is a required field.
3. In the Address 2 field, indicate the second line of the business address. This is an optional field.
4. In the City, State, and ZIP fields, indicate the appropriate information for the business address. These fields are required.
5. In the Country field, indicate the country of the business. This is an optional field.
6. In the Telephone fields, provide the business phone number, including area code. This is a required field.
7. Indicate the website address (URL) for the business. This is an optional field.

In the Billing Provider Credentials fields, enter information specific to the billing provider. The information entered in these fields must match the information supplied in the provider’s enrollment application.

8. In the FEIN/SSN field, indicate the provider’s tax ID. This is a required field.
9. Complete one of the following:
 - If the provider enrolled in MaineCare using a National Provider Identifier (NPI), supply the provider’s number in the NPI field.
 - If the provider enrolled in MaineCare without an NPI, supply the Atypical Provider Identifier (API), that was assigned during enrollment, in the Medicaid Provider ID field.
10. In the PIN field, supply the provider’s enrollment case number. This is a required field.
11. Complete one of the following:
 - To continue to the next step in the registration process, click the **Next** button. Proceed to **Section 4.3, Specify Security Information**.
 - To cancel the registration, click the **Cancel** button.

4.3 Specify Security Information

On the second window, create a user name, password, and security question and answer. Specify a valid email address.

The Security Information window appears as shown in **Figure 4-4** below.

The screenshot shows a web-based registration window titled "Step 2: Security Information". The window has a light green background and a dark blue header bar. The header bar contains a progress bar with five steps: "Step 1: Demographic Information", "Step 2: Security Information" (which is highlighted), "Step 3: MaineCare : Electronic Remittance Advice Information", "Step 4: Confirm Information", and "Step 5: Agreement". Each step has a small downward arrow icon. The main content area contains several input fields with labels and asterisks indicating they are required. The fields are: "User Name:", "Password:", "Re-enter Password:", "Email Address:", "Re-enter Email Address:", "Security Question:", and "Security Answer:". There are also three buttons at the bottom: "Next", "Back", and "Cancel". A small text note above the Password field states: "Password must contain at least 6 characters consisting of an upper and lower case letter, a special character such as a # or * or ^ (except ,) and a number." Another small text note above the Security Question field states: "Please enter a confidential question and answer for password reset and user name recovery purposes."

Figure 4-4: Security Information

To complete the Security window, follow the steps below:

1. In the User Name field, type a user ID.
2. In the Password field, type a password. It must be at least six characters long and contain at least one each of an upper case letter, a lower case letter, a special character (such as an asterisk “*”) and a number. The password may not contain spaces.
3. In the Re-Enter Password field, retype the password exactly as typed in the Password field.
4. In the Email Address field, type a valid email address. (A confirmation email is sent to this address, so it is important that the address is valid.)
5. In the Re-Enter Email Address field, retype the email address exactly as typed in the previous field.
6. In the Security Question and Answer fields, make up and type a confidential question and its answer, respectively. (For example, “What street did I live on as a child?” or “What was the make of my first car?”) If a password is forgotten, this question and answer pair is used to verify the user’s identity.

NOTE: All fields are required.

7. Complete one of the following:
 - To continue to the next step in the registration process, click the **Next** button. Proceed to **Section 4.4, Electronic Remittance Advice (ERA) Information**.
 - To return to the previous registration step, click the **Back** button. Refer to **Section 4.2, Provide Demographics Information**, for instructions.
 - To cancel the registration, click the **Cancel** button.

4.4 Electronic Remittance Advice (ERA) Information

The demographic information entered by the trading partner is pre-populated on this window, as shown in **Figure 4-5** below. Verify this information is accurate.

NOTE: If a healthcare provider will be receiving Electronic Funds Transfer (EFT) payments, they must proactively contact their financial institution to arrange for the delivery of the CORE required minimum CCD+ Data Elements necessary for successful re-association of the EFT payment with the ERA Remittance Advice.

Step 1: Demographic Information ✓

Step 2: Security Information ✓

Step 3: MaineCare : Electronic Remittance Advice Information

NOTE: A healthcare provider must proactively contact its financial institution to arrange for the delivery of the CORE required Minimum CCD+ Data Elements necessary for successful re-association of the EFT payment with the ERA remittance advice.

Provider Information

Provider Name : Peter R. Ovider

Doing Business As Name (DBA) :

Provider Address

Street : Street Name

City : City Name

State/Province : State/Province Name:

Zip Code/Postal Code : Zip Code/Postal Code

Country Code : US

Provider Identifiers

Provider Federal Tax Identification Number (TIN)

or Employee Identification Number(EIN) :

National Provider Identifier (NPI) :

Other Identifier(s) :

Assigning Authority :

Figure 4-5: ERA Information

1. Click the **drop down arrow**, see **Figure 4-6** below, and select the preference for the aggregation of the remittance data:
 - Provider Tax Identification Number (TIN)
 - National Provider Identifier (NPI)

Electronic Remittance Advice Information

* Preference for Aggregation of Remittance Data
(e.g., Account Number Linkage to Provider Identifier):

Method of Retrieval:

Provider Tax Identification Number (TIN)

National Provider Identifier (NPI)

Third Party

Submission Information

Reason for Submission : New Enrollment

Authorized Signature :

* Electronic Signature of Person Submitting Enrollment :

Requested ERA Effective Date :

Update Cancel

Figure 4-6: Aggregation of Remittance Data

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2. Click the **radio button** next to the choice for method of retrieval of the remittance advice, as shown in **Figure 4-7** below:
 - Download PDF
 - Download 835
 - No 835
 - Third Party

The screenshot shows a form titled "Electronic Remittance Advice Information". It contains a dropdown menu for "Preference for Aggregation of Remittance Data (e.g., Account Number Linkage to Provider Identifier)". Below this is a "Method of Retrieval" section with four radio button options: "Download PDF", "Download 835", "No 835", and "Third Party". The "Download 835" option is selected.

Figure 4-7: Method of Retrieval

The Reason for Submission and the Authorized Signature fields are pre-populated. Verify this information is accurate.

3. Enter the Electronic signature of the person submitting the enrollment.
4. Enter the date the provider wishes to begin ERA, as shown in **Figure 4-8** below.

The screenshot shows a form titled "Submission Information". It contains a dropdown menu for "Reason for Submission" with "New Enrollment" selected. Below this is an "Authorized Signature" field. Then, there is a red asterisk followed by "Electronic Signature of Person Submitting Enrollment" and a text input field. Below that is "Requested ERA Effective Date" with a text input field and a calendar icon. At the bottom are "Update" and "Cancel" buttons.

Figure 4-8: Submission Information

5. Click the **Update** button.
6. To cancel the registration, click the **Cancel** button.

4.5 Confirm Information

After completing the Security Information and the ERA Information windows, click the **Update** button, the Confirm Information window appears, as shown in **Figure 4-9** below.

Step 1: Demographic Information

Step 2: Security Information

Step 3: MaineCare: Electronic Remittance Advice Information

Step 4: Confirm Information

Step 5: Agreement

Name : Peter R. Ovider
Address : Street Name
City : City Name
State : State/Province Name
Zip : Zip Code/Postal Code
Country : USA
Telephone : 207-555-1212
User Name : SampleProvider
Email Address : p.r.ovidier@domainname.com
Security Question : What was the name of the first street I lived on?
Security Answer : Park

Confirm Back Cancel

Figure 4-9: Confirmation Information

Verify that all information displayed on this window is accurate. If anything is incorrect, click the **Back** button to go back to the window where the information was originally entered; correct the field, and click the **Next** or **Update** button until reaching the Confirm Information window again.

After verifying the accuracy of the information on this window, complete one of the following:

- To continue to the next step in the registration process, click the **Confirm** button. Proceed to **Section 4.6, Sign the Agreement Electronically**.
- To return to the previous registration step, click the **Back** button. Refer to **Section 4.3, Specify Security Information** for instructions.
- To cancel the registration, click the **Cancel** button.

4.6 Sign the Agreement Electronically

After confirming the information, the Electronic Signature window appears, as shown in **Figure 4-10** below.

Step 1: Demographic Information ✓
Step 2: Security Information ✓
Step 3: MaineCare: Electronic Remittance Advice Information ✓
Step 4: Confirm Information ✓
Step 5: Agreement ▲

Trading Partner ID:
Entity Type: PROV
FEIN:

Molina Medicaid Solutions - Maine
PROVIDER TRADING PARTNER AGREEMENT

Please read the entire agreement and provide your electronic signature of acceptance.

This Electronic Trading Partner Agreement (hereinafter "Agreement") is made by and between Molina

☒ Yes, I agree to the above terms and conditions.

Please Enter the First Name and Last Name as in Demographics Information (Document Text)

* Signature: Date:
Host Name: IP Address:

Figure 4-10: Electronic Signature

On the Electronic Signature window, the Trading Partner Agreement (TPA) is displayed. Be sure to read the agreement. To agree to the terms and conditions of the Agreement, click the **checkbox** below it that indicates **“Yes, I agree to the above terms and conditions”**.

To sign the Agreement, type the first and last names as it was entered on the Demographics Information window (Step 1/5) in **Section 4.2, Provide Demographics Information**, exactly as they appear there. Then, complete one of the following:

1. To print the trading partner agreement, click the **Print** link that is located below the right side of the agreement window. This could be useful to facilitate any reviews of the agreement.
2. To complete the registration process, click the **Register** button. Proceed to **Section 4.7, Activate Account**. To go back to the Confirm Information window, click the **Back** button. Refer to **Section 4.5, Confirm Information**, for instructions.
3. To cancel the registration, click the **Cancel** button.

4.7 Activate Account

After signing the Trading Partner Agreement and clicking the **Register** button, the Registration window appears, as shown in **Figure 4-11** below.

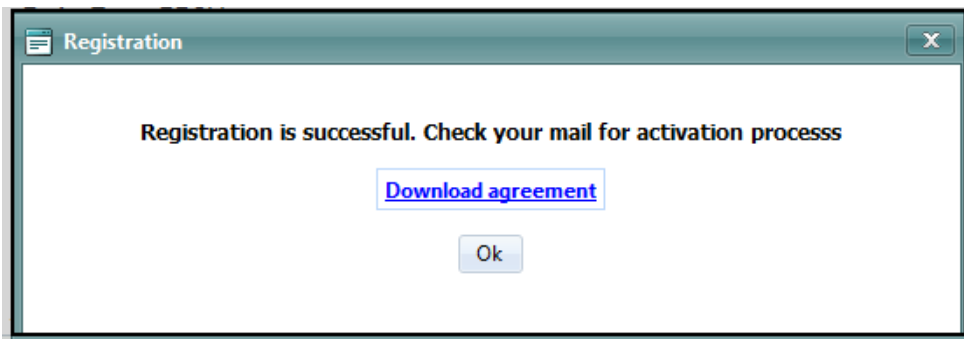


Figure 4-11: Registration

A pdf version of the TPA can be downloaded by selecting the **Download agreement** link. Select the **Ok** button to complete registration. After account activation, a confirmation email with the trading partner ID (TPID) is sent to the address specified during the registration process.

5. Trading Partner Login

Once the account is activated, log in to the secure trading partner features, by entering the user name and password in the online portal Provider page fields- see **Figure 5-1** below, and then click the **Sign In** button.

MaineCare Services
An Office of the Department of Health and Human Services

Health PAS-Online

Home Provider Member

Home > Provider

Trading Partner Sign In

User Name:

Password:

Sign In

[Register](#)
[Reset Password](#)
[Retrieve User Name](#)

Provider Useful Links

Provider Enrollment Links

- In-State Provider Enrollment
- Resume Your Enrollment
- Check Status of Enrollment App
- Out of State Provider Enrollment
- Non Medicaid Provider Enrollment

Important Updates

Known Issues and Statuses 2/7/2011 9:33 PM
by spadmin
[See full listing of Known Issues and Statuses.](#)

MECMS Timely Filing 2/7/2011 9:32 PM
by AugAdmin
Did you catch the MaineCare listserv on MECMS Decommissioning?
If not, please [read it today](#) if you have any questions or concerns about submitting claims for dates of services prior to 9/1/10.

Changes to Phone Lines 2/7/2011 9:29 PM
by AugAdmin
On February 1st, we had some changes in our phone lines.
For MeCMS claims (pre 9/1/2010 dates of service) contact your [Provider Relations Specialist](#) directly.
For MIHMS claims (9/1/2010 and later dates of service) use the [MaineCare Services Phone...](#)

New Link Available! 2/1/2011 3:37 PM
by AugAdmin
There is a new link available under the Provider Useful links called [National Correct Coding Initiative Edits](#). This link will direct you to the CMS website for more information on the National Correct Coding Initiative.

Figure 5-1: User Name and Password

The Welcome to Trading Partner window appears, as shown in **Figure 5-2** below.

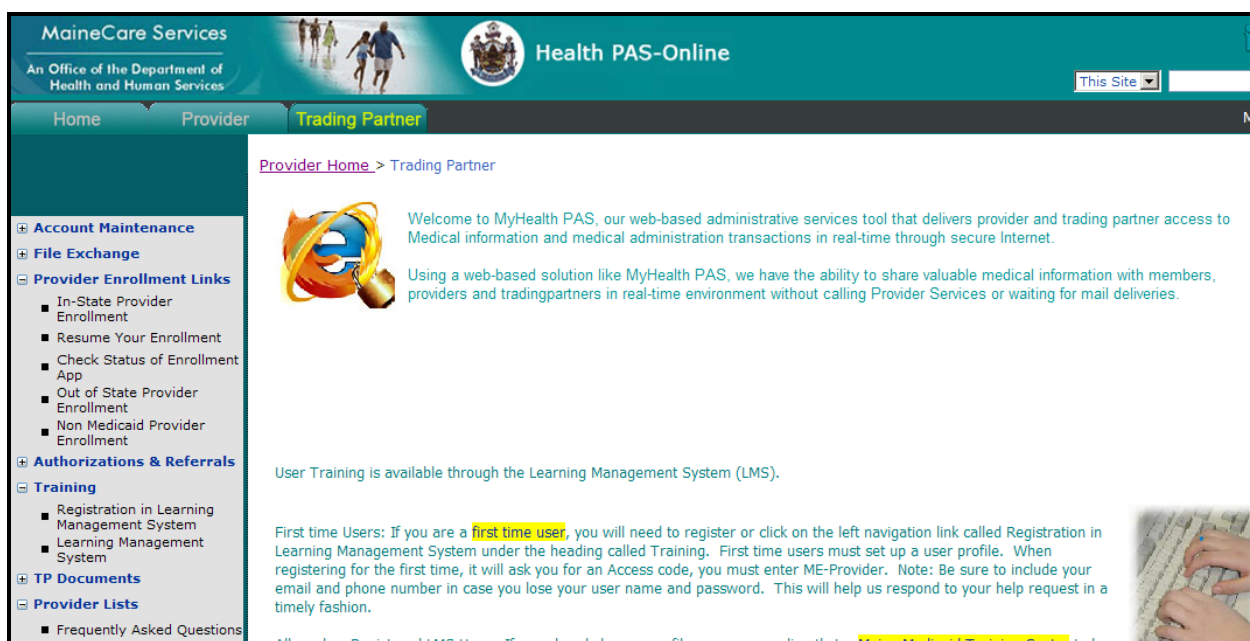


Figure 5-2: Welcome to Trading Partner

6. Trading Partner Logoff

When the user has logged in as a trading partner, the top status bar changes to indicate both the trading partner ID (TPID) and the user name for the person that is currently logged in. See sample status bar in **Figure 6-1** below.

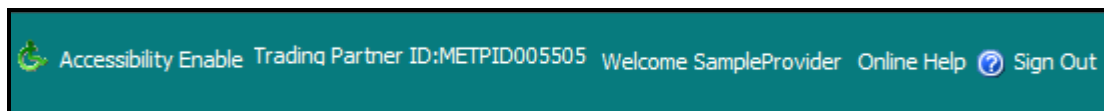


Figure 6-1: Trading Partner ID and User Name

To log off from the online portal, click the **Sign Out** link in the status bar.

7. Account Maintenance

7.1 Password Reset Overview

For additional security, users are required to change the password for the trading partner log in every 60 days. The user name does not change, but the password must be changed. If the password is not changed after 60 days, the user is prompted to reset the password at the next sign in.

If the password for the trading partner user name needs to be reset the following methods are used:

- If the current password is known, the password is reset using the Account Maintenance feature. This method is described in **Section 7.2, Resetting When the Current Password is Known**.
- If the current password is not known, it is reset from the online portal Provider page. This method is described in **Section 7.3, Resetting When the Current Password is Not Known**.

7.2 Resetting When the Current Password is Known

If the current password for the trading partner user name is known, sign in to the online portal. The online portal displays the Welcome to Trading Partner window, as shown in **Figure 7-1** below.



Figure 7-1: Welcome to Trading Partner

1. From the menu at left, select the **Account Maintenance** link to expand the list. From the expanded list, select the **Reset Password** option. The Reset Password window appears, as shown in **Figure 7-2** below.

The screenshot shows the Reset Password form. It has a title bar that says "Reset Password". Below the title bar, there are three input fields: "Current Password:", "New Password:", and "Confirm New Password:". Each field is preceded by an asterisk. To the right of the "Current Password:" field, there is a block of text providing password requirements: "New password should not be same as old password. Password must contain at least 6 characters consisting of an upper and lower case letter, a special character such as a # or * or ^ (except ,) and a number." At the bottom of the form, there are two buttons: "Change Password" and "Cancel".

Figure 7-2: Reset Password

2. To reset the password, follow the steps below:
 - a. In the Current Password field, specify current password.

- b. In the New Password field, type a different password that follows the password guidelines. It must be at least six characters long and contain at least one each of an upper case letter, a lower case letter, a special character (such as an asterisk “*”) and a number. The password may not contain spaces.
- c. In the Confirm New Password field, retype the password exactly as typed in the New Password field.
- d. Click the Change Password button. The online portal displays a confirmation message, as shown in **Figure 7-3** below.

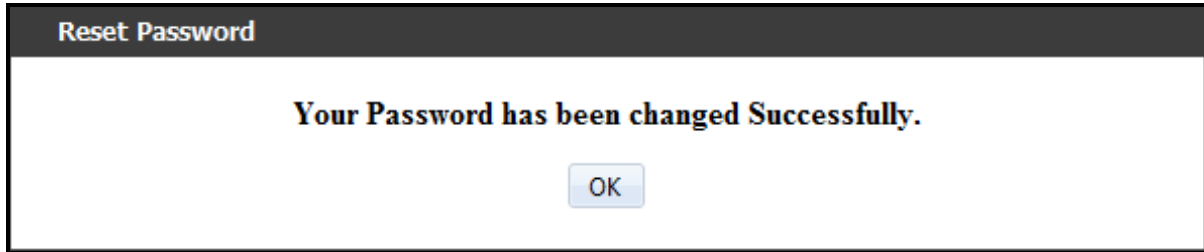


Figure 7-3: Confirmation Message

3. . Click **OK** to continue. The online portal returns to the Welcome to Trading Partner window.

7.3 Resetting When the Current Password is Not Known

If the current password is forgotten or lost for the trading partner user name, it is reset from the online portal Provider page. To begin, choose the Reset Password link, as shown in **Figure 7-4** below.



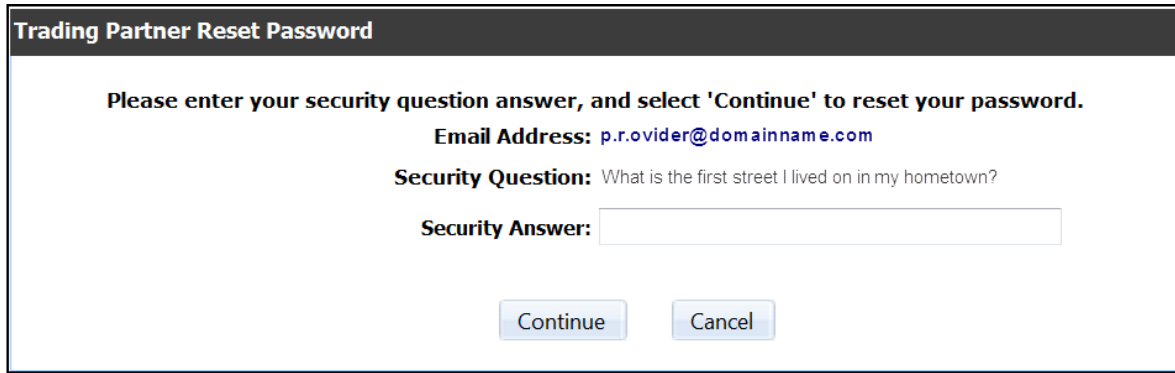
Figure 7-4: Reset Password Link

1. The online portal displays the Trading Partner Reset Password window, as shown in **Figure 7-5** below.

Figure 7-5: Forgot Your Password

2. Specify the trading partner user name in the box and click the **Continue** button.
3. The online portal displays the email address and security question associated with this user name, as shown in **Figure 7-6** below.

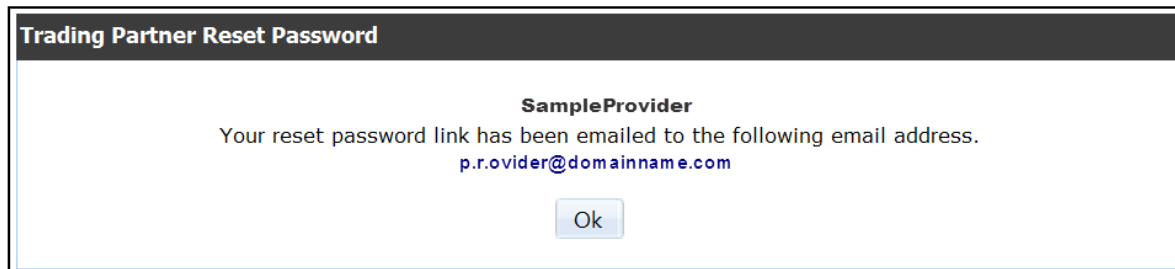
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The screenshot shows a web form titled "Trading Partner Reset Password". The instructions read: "Please enter your security question answer, and select 'Continue' to reset your password." Below this, the "Email Address" is displayed as "p.r.ovidier@domainname.com". The "Security Question" is "What is the first street I lived on in my hometown?". There is a text input field for the "Security Answer". At the bottom are two buttons: "Continue" and "Cancel".

Figure 7-6: Email Address and Security Q&A

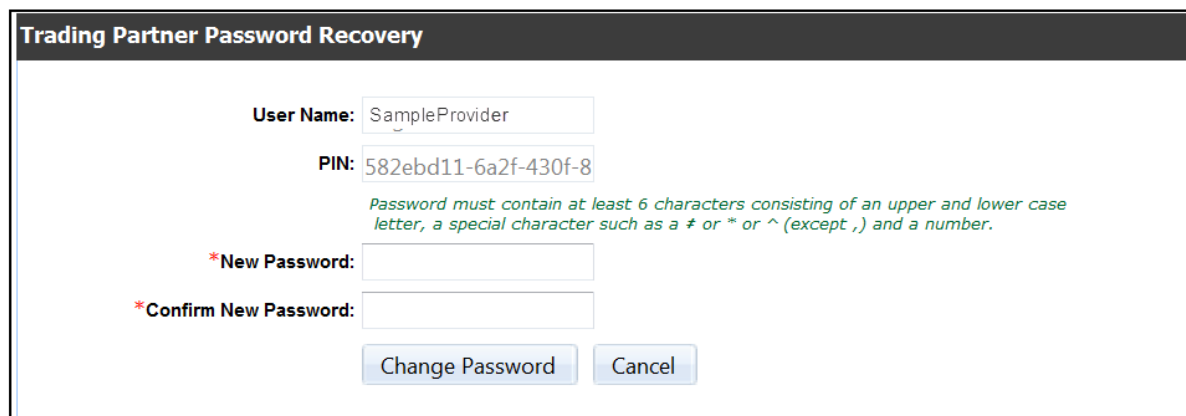
4. Type the answer to the security question in the Security Answer box and click the **Continue** button. If the question is answered successfully, the online portal sends an email to the address associated with the user name and displays the confirmation message shown in **Figure 7-7** below.



The screenshot shows a confirmation message titled "Trading Partner Reset Password". It states: "SampleProvider Your reset password link has been emailed to the following email address. p.r.ovidier@domainname.com". There is an "Ok" button at the bottom.

Figure 7-7: Confirmation of Password

5. The email contains a confirmation link and activation PIN. After receiving the email, click the **link** (or copy it and paste it into the address bar of a web browser). The online portal displays the Change Password window with the user name and activation PIN already filled in, as shown in **Figure 7-8** below:



The screenshot shows a "Trading Partner Password Recovery" form. The "User Name" field is pre-filled with "SampleProvider". The "PIN" field is pre-filled with "582ebd11-6a2f-430f-8". Below the PIN field is a green text note: "Password must contain at least 6 characters consisting of an upper and lower case letter, a special character such as a # or * or ^ (except ,) and a number." There are two text input fields for the "New Password" and "Confirm New Password". At the bottom are "Change Password" and "Cancel" buttons.

Figure 7-8: Change Password

6. To complete the Change Password window, follow the steps below:
 - a. In the New Password field, type a password that follows the password guidelines. It must be at least six characters long and contain at least one each of an upper case letter, a lower case letter, a special character (such as an asterisk “*”) and a number. The password may not contain spaces.

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- b. In the Confirm New Password field, retype the password exactly as typed in the New Password field.
- c. Click the **Change Password** button. The online portal displays a confirmation message, as shown in **Figure 7-9** below.

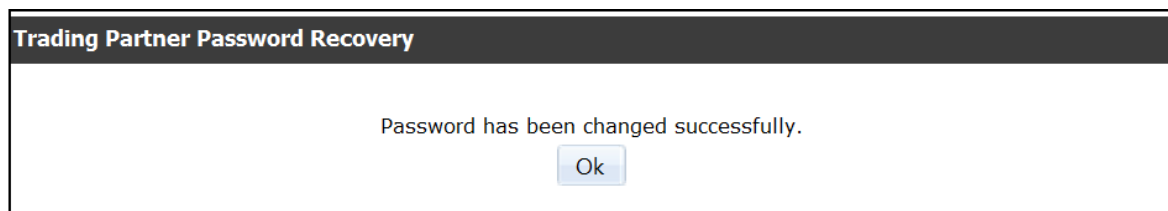


Figure 7-9: Password Reset

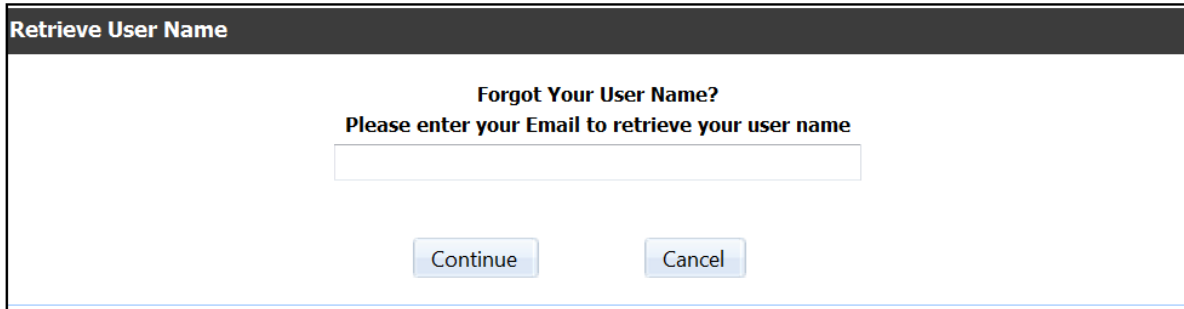
7.4 User Name Retrieval

If the trading partner user name is forgotten it is retrieved using the Retrieve User Name link on the online portal Provider page- see **Figure 7-10** below.



Figure 7-10: Retrieve User Name Link

1. After clicking the link, the online portal displays the Retrieve User Name window, as shown in **Figure 7-11** below.



Retrieve User Name

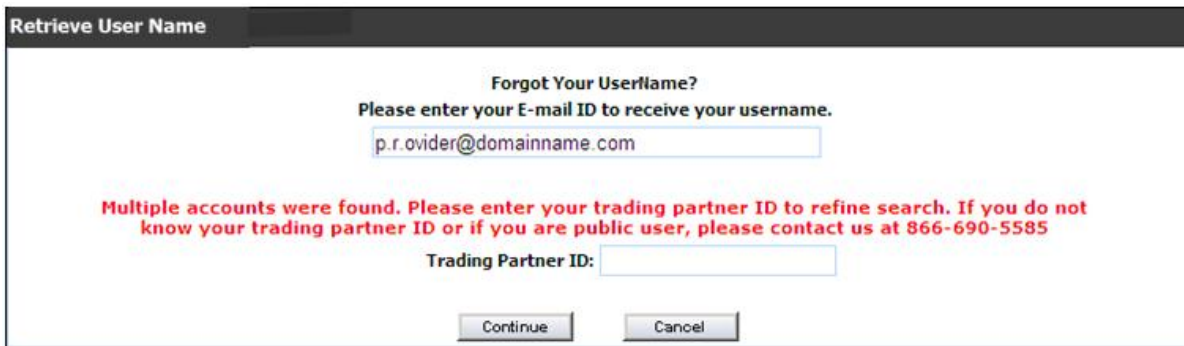
Forgot Your User Name?

Please enter your Email to retrieve your user name

Continue Cancel

Figure 7-11: Email Specification for User Name Retrieval

2. Type the email address for the user name to retrieve. Click the **Continue** button.
3. If the email address entered is associated to multiple trading partner accounts, the online portal will display an error, as shown in **Figure 7-12** below. (If the email address is associated to only one trading partner account the online portal will not show this error.)



Retrieve User Name

Forgot Your Username?

Please enter your E-mail ID to receive your username.

p.r.ovidier@domainname.com

Multiple accounts were found. Please enter your trading partner ID to refine search. If you do not know your trading partner ID or if you are public user, please contact us at 866-690-5585

Trading Partner ID:

Continue Cancel

Figure 7-12: Multiple Accounts Error

4. If this error appears, enter the trading partner ID (TPID) in the field provided. (This number was emailed to the user when the trading partner account was created. It is the same number that is used as the sender ID for X12 submissions.) Click the **Continue** button.

NOTE: If the trading partner ID is not known, call the number listed in the error message for additional assistance.

5. After entering the email address (and trading partner ID, if needed) and click the **Continue** button, the online portal displays the email address and security question, as shown in **Figure 7-13** below.

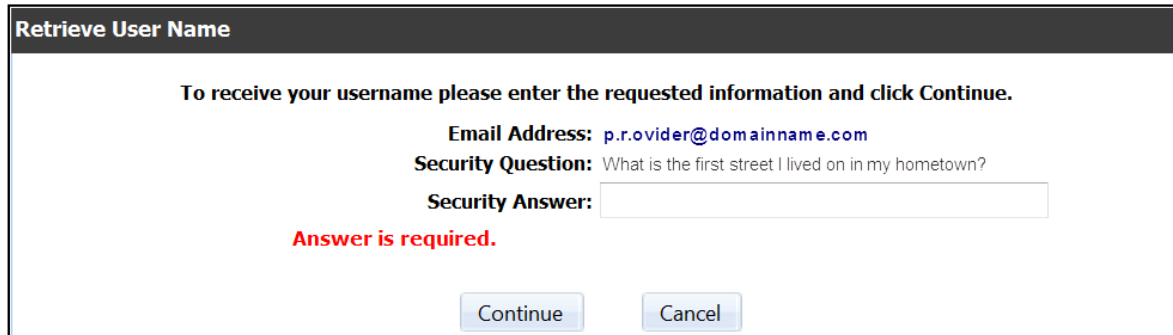


Figure 7-13: Email Address and Security Q&A

6. Type the answer to the security question in the Security Answer box and click the **Continue** button. If the question is successfully answered, the online portal sends an email to the address associated with the user name and displays the confirmation message shown in **Figure 7-14** below.

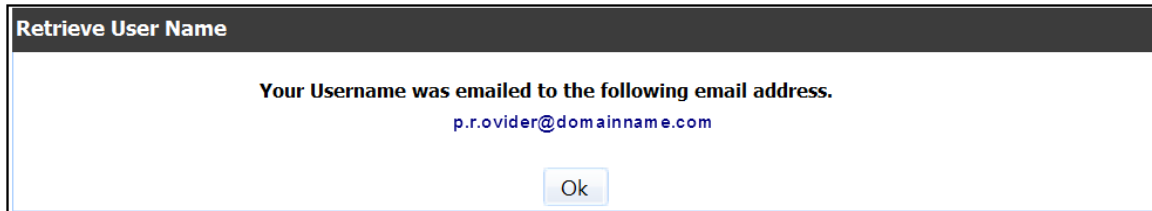


Figure 7-14: Confirmation Message for User Name Retrieval

7. Click **Ok**. The email contains the user name and trading partner ID.

8. User Maintenance

The trading partner user maintenance tasks include:

- Affiliating multiple Pay-To NPIs to one trading partner user name. This is set up in the Provider Associations feature. Refer to **Section 8.1, Provider Associations** for instructions.
- Creating provider representative associations to one trading partner user name; if there are multiple users that require access to the secure trading partner features. This is set up in the Manage Users feature. Refer to **Section 8.2.1, Adding Users**, for instructions.

8.1 Provider Associations

8.1.1 Associating Additional NPIs to Trading Partner Account

When the trading partner account was created, billing providers were required to specify information from one provider enrollment case. If there are multiple NPIs to monitor under a single trading partner account, follow these steps.

1. Sign in to the secure Trading Partner area on the online portal Provider page.
2. On the Welcome to Trading Partner window, expand the **User Maintenance** option in the far left column.
3. Choose the **Provider Associations** option. The online portal displays the initial Provider Associations window, as shown in **Figure 8-1** below.

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The following billing providers are associated with this trading partner account. Add additional billing/pay-to provider records by selecting the 'Add Provider' button. Billing provider associations must be established to use the direct data entry forms and provider maintenance features of Health PAS Online. By default your remittance advice(s) will be delivered to your online account in PDF format. If you wish to receive a physical copy by mail, deselect the check box below under the heading 'PDF RA'. Enable access to the 835 remittance advice by selecting an available delivery location from the menu. Available choices include 'My Account' and registered billing agencies and clearinghouses. If choosing a billing agency or clearinghouse, please verify the entity is prepared to process your 835 before making the selection.

Add New Provider Print

Provider Name	Provider ID/NPI	FED ID	PDF RA	835	Action
			<input type="checkbox"/>		Edit ERA Delete

Figure 8-1: Initial Provider Associations

On this window, the user will see a list of all the tax IDs associated with the trading partner account.

4. Click the **Add New Provider** button. The Provider Associations window changes to include several additional fields, as shown in **Figure 8-2** below.

Enter values for FEIN/SSN; either NPI or Provider ID; and PIN

* FEIN/SSN:

NPI:

Provider ID:

A Valid PIN or Check Number is required, please enter one

* PIN/Check:

[Add Provider](#) [Cancel](#)

Figure 8-2: Add Provider

5. To complete these fields, provide the following information:
 - a. In the FEIN/SSN field, indicate the provider's tax ID.
 - b. Complete one of the following:
 - i. If the provider enrolled in MaineCare using an NPI, supply the provider's number in the NPI field.
 - ii. If the provider enrolled in MaineCare without an NPI, supply the Atypical Provider Identifier (API), which was assigned to them during enrollment, in the Medicaid Provider ID field.
 - c. In the PIN/Check field, supply either the provider's enrollment case number or the number of a check issued to the provider in the last 60 days.
6. Click the **Add Provider** button below the PIN/Check field. The online portal adds another row to the table at the bottom of the window and displays the provider name and tax ID that corresponds to the information specified, as shown in **Figure 8-3** below.

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Provider Associations

The following billing providers are associated with this trading partner account. Add additional billing/pay-to provider records by selecting the 'Add Provider' button. Billing provider associations must be established to use the direct data entry forms and provider maintenance features of Health PAS Online. By default your remittance advice(s) will be delivered to your online account in PDF format. If you wish to receive a physical copy by mail, deselect the check box below under the heading 'PDF RA'. Enable access to the 835 remittance advice by selecting an available delivery location from the menu. Available choices include 'My Account' and registered billing agencies and clearinghouses. If choosing a billing agency or clearinghouse, please verify the entity is prepared to process your 835 before making the selection.

[Add New Provider](#) [Print](#)

Provider Name	Provider ID/NPI	FED ID	Action
Peter R. Ovider			Delete
New Provider			Delete

Figure 8-3: Provider Associations with Second Provider Added

7. To associate another set of information to this trading partner account, repeat the process described in steps 5 and 6.

8.1.2 Removing NPI from Trading Partner Account

To remove an NPI from the provider associations, follow these steps:

1. Sign in to the secure Trading Partner area on the online portal Provider page.
2. On the Welcome to Trading Partner window, expand the **User Maintenance** option in the far left column.
3. Choose the **Provider Associations** option. The online portal displays the initial Provider Associations window, as shown in Error! Reference source not found. below.

Provider Associations

The following billing providers are associated with this trading partner account. Add additional billing/pay-to provider records by selecting the 'Add Provider' button. Billing provider associations must be established to use the direct data entry forms and provider maintenance features of Health PAS Online. By default your remittance advice(s) will be delivered to your online account in PDF format. If you wish to receive a physical copy by mail, deselect the check box below under the heading 'PDF RA'. Enable access to the 835 remittance advice by selecting an available delivery location from the menu. Available choices include 'My Account' and registered billing agencies and clearinghouses. If choosing a billing agency or clearinghouse, please verify the entity is prepared to process your 835 before making the selection.

[Add New Provider](#) [Print](#)

Provider Name	Provider ID/NPI	FED ID	PDF RA	835	Action
			<input type="checkbox"/>		Edit ERA Delete

Figure 8-4: Provider Associations Window

4. Click the **Delete** button. A dialog box with a confirmation question appears.
5. Click the **OK** button. The association is deleted, and the Provider Associations window displays the updated list.

8.2 Manage Users

8.2.1 Adding Users

Use the Manage Users link to grant new users access to the billing provider's trading partner account.

1. Sign in to the secure Trading Partner area on the online portal Provider page.
2. On the Welcome to Trading Partner window, expand the **Account Maintenance** option in the far left column.
3. Choose the **Manage Users** link as shown in **Figure 8-5** below.



Figure 8-5: Account Maintenance

4. Click the **Add User** button, as shown in **Figure 8-6** below.

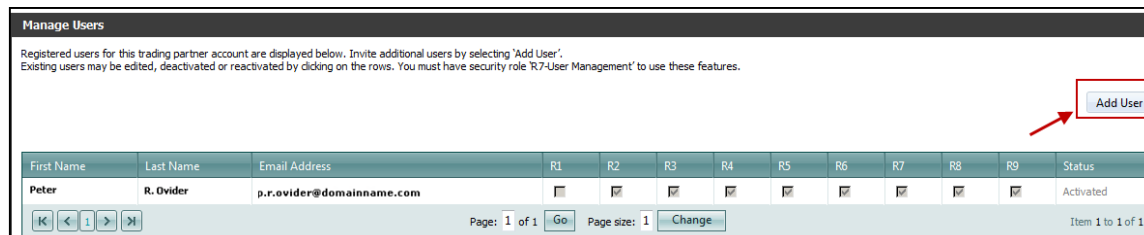


Figure 8-6: Add User

5. The Manage Users window updates to display the fields needed to invite an additional user and specify their permissions, as shown in **Figure 8-7** below.

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Figure 8-7: Permission Fields

6. To complete the fields, follow these steps:
 - Specify the invited user's first and last names in the First Name and Last Name fields, respectively. These are required fields.
 - In the Email Address field, specify the invited user's email address. This is a required field.
 - Select at least one permission for the invited user. (Selections can be modified later to give users any number or combination of permissions as business needs change. Please see Section 8.2.2, Trading Partner Permission Codes, for a more detailed description of the powers allowed, by each permission.)
7. Click the **Submit** button. The online portal sends an email invitation to the specified user. The Manage Users window displays the invited user's name, email address, and permissions, as shown in **Figure 8-8** below.

First Name	Last Name	Email Address	R1	R2	R3	R4	R5	R6	R7	R8	R9	Status
New	User	new.user@domainname.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Invited
Peter	R. Ovider	p.r.ovidier@domainname.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Activated

Figure 8-8: Invited Users

In order for the invited user to activate their account, they must follow the steps described in **Section 8.2.3, (Invited Users Only) Activating a Trading Partner Representative Account**.

8. To invite additional users, repeat the process described in steps 4 through 7 above.

8.2.2 Trading Partner Permission Codes

Though each user on a trading partner account must have at least one permission, any combination of the permissions are available to assign. Please find in this section a table listing all permission codes and another detailing the powers that each code grants to users- see **Table 1** and **Table 2** below.

Table 1: Trading Partner Permission Codes & Descriptions

Requires TPA	Code	Trading Partner User Access Area	User Powers*
Y	R1	Provider Enrollment Maintenance	Provider account maintenance
Y	R2	Trading Partner Maintenance	Account maintenance including provider associations and demographics updates
Y	R3	X12 EDI Transactions	File Exchange (X12), and report access
Y	R4	Claim Submission, Claim Status	Access Remittance Advice (PDF) and reports, claim submission, claim status, patient roster and primary care roster
Y	R5	Eligibility Verification	Eligibility verification, patient roster and primary care roster
Y	R6	Payment Status	Provider payment status
Y	R7	User Management	Manage account users
Y	R8	Referral Submission & Status, Authorization Submission & Status	Authorization submission, authorization status, patient roster, primary care roster, referral submission and referral status
Y	R9	Alerts and Subscriptions	EDI Gateway alerts and subscriptions– these advise trading partners when they have a X.12 (825, 271, RA, etc.,) response awaiting collection.
* All codes grant personal password reset powers.			

Not all powers are available to every type of trading partner account. For the list of the powers available to users for billing provider trading partner accounts, refer to **Table 2** below.

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Table 2: Provider User Powers Grid

Requires TPA	Menu Item	Health PAS Online User Access*	Billing Provider
	Account Maintenance		Access Rights
Y	Manage Users	R7	X
Y	Provider Associations	R2	X
Y	Reset Password	All	X
Y	Update Demographics	R2	X
Y	File Exchange (X12)	R3	X
Y	Remittance Advice (PDF)	R4	X
Y	Other Reports	All	X
Y	Alerts and Subscriptions	R9	X
	Form Entry		Access Rights
Y	Authorization Submission	R8	X
Y	Authorization Status	R8	X
Y	Claim Submission	R4	X
Y	Claim Status	R4	X
Y	Eligibility Information	R5	X
Y	Patient Roster	R4, R5, R8	X
Y	Primary Care Roster	R4, R5, R8	X
Y	Provider Payment Status	R6	X
Y	Referral Submission	R8	X
Y	Referral Status	R8	X
	Provider Enrollment		Access Rights
Y	Provider Maintenance	R1	X

8.2.3 (Invited Users Only) Activating a Trading Partner Representative Account

When a user is invited to create a trading partner representative account an email is sent that contains an activation link. The invited user should click this link to begin their enrollment process. An example of the Trading Partner Representative Registration window appears, as shown in Figure 8-9 below.

Trading Partner Provider Representative

*Indicates Required Information

*User Name:

*Password: Password must contain at least 6 characters consisting of an upper and lower case letter, a special character such as a # or * or ^ (except ,) and a number.

*Re-enter Password:

*Email Address:

*Re-enter Email Address:

Please enter a confidential question and answer for password reset and user name recovery purposes.

*Security Question:

*Security Answer:

Figure 8-9: Trading Partner Registration

To complete this window, follow these steps:

1. In the User Name field, type a user ID.
2. In the Password field, type a password. It must be at least six characters long and contain at least one each of an upper case letter, a lower case letter, a special character (such as an asterisk “*”) and a number. The password may not contain spaces.
3. In the Re-Enter Password field, retype the password exactly as typed in the Password field.
4. The Email Address field will be auto-populated. Verify this information is accurate.
5. The Re-Enter Email Address field will be auto-populated. Verify this information is accurate.
6. In the Security Question and Answer fields, make up and type a confidential question and its answer, respectively. (For example, “What street did I live on as a child?” or “What was the make of my first car?”) If a password is forgotten this question and answer pair is used to verify the user’s identity.

NOTE: All fields are required.

7. Click the **Continue** button. The online portal creates the user name and password as specified. (To log in to the secure trading partner feature, the invited user will use this information in the User Name and Password fields on the online portal Provider page. Refer to **Section 5, Trading Partner Login** for more information about logging in to the online portal.

8.2.4 Modifying User Permissions

To modify the permissions granted to a provider representative, the user must have R7 (User Management) permission for the trading partner account. Follow the steps below:

1. Sign in to the secure trading partner area on the online portal Provider page.
2. On the Welcome to Trading Partner window, expand the **User Maintenance** option in the far left column.
3. Choose the **Manage Users** option. The online portal displays the initial Manage Users window, as shown in **Figure 8-10** below.

Manage Users

Registered users for this trading partner account are displayed below. Invite additional users by selecting 'Add User'. Existing users may be edited, deactivated or reactivated by clicking on the rows. You must have security role 'R7-User Management' to use these features.

Add User

First Name	Last Name	Email Address	R1	R2	R3	R4	R5	R6	R7	R8	R9	Status
New	User	new.user@domainname.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Invited
Peter	R. Ovider	p.r.ovidier@domainname.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Activated

Page: 1 of 1 Go Page size: 2 Change Item 1 to 2 of 2

Adding of a Provider Representative request is successful

Figure 8-10: Manage Users

4. Click **anywhere on the row** of the user whose permissions need to be modified. The Manage Users window expands to show identification, status, and permissions fields for the user selected.
5. Modify the information as necessary, see **Figure 8-11** below.

Edit User

* First Name: New * Last Name: User

* Email Address: new.user@domainname.com Status: Activated

Select at least one role:

<input checked="" type="checkbox"/> Select All	<input type="checkbox"/> R1 - Provider Enrollment
<input checked="" type="checkbox"/> R2 - Trading Partner Maintenance	<input checked="" type="checkbox"/> R3 - X12 Submissions
<input checked="" type="checkbox"/> R4 - Claims Submissions	<input type="checkbox"/> R5 - Eligibility
<input type="checkbox"/> R6 - Finance	<input checked="" type="checkbox"/> R7 - User Management
<input checked="" type="checkbox"/> R8 - Utilization Management	<input checked="" type="checkbox"/> R9 - Alerts and Subscriptions

Update Cancel

Figure 8-11: Additional Permissions

6. Click the **Update** button. The online portal saves the changes and refreshes the window to show the user list with the modified permissions, as shown in **Figure 8-12** below.

Manage Users

Registered users for this trading partner account are displayed below. Invite additional users by selecting 'Add User'. Existing users may be edited, deactivated or reactivated by clicking on the rows. You must have security role 'R7-User Management' to use these features.

[Add User](#)

First Name	Last Name	Email Address	R1	R2	R3	R4	R5	R6	R7	R8	R9	Status
New	User	new.user@domainname.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Invited
Peter	R. Ovider	p.r.ovidier@domainname.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Activated

Page: 1 of 1 Go Page size: 2 Change Item 1 to 2 of 2

Provider Representative details Updated Successfully

Figure 8-12: User List Modified Permissions

8.2.5 Terminating a User

It is important for billing providers to maintain their trading partner accounts and inactive users when they should no longer have access (e.g. when a user has left the practice.)

To complete this window, follow these steps:

1. Sign in to the secure trading partner area on the online portal Provider page.
2. On the Welcome to Trading Partner window, expand the **User Maintenance** option in the far left column.
3. Choose the **Manage Users** option. The online portal displays the initial Manage Users window, as shown in **Figure 8-13** below.

Manage Users

Registered users for this trading partner account are displayed below. Invite additional users by selecting 'Add User'. Existing users may be edited, deactivated or reactivated by clicking on the rows. You must have security role 'R7-User Management' to use these features.

[Add User](#)

First Name	Last Name	Email Address	R1	R2	R3	R4	R5	R6	R7	R8	R9	Status
New	User	new.user@domainname.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Invited
Peter	R. Ovider	p.r.ovidier@domainname.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Activated

Page: 1 of 1 Go Page size: 2 Change Item 1 to 2 of 2

Provider Representative details Updated Successfully

Figure 8-13: Manage Users

4. Click **anywhere on the row** of the user whose permissions need to be terminated. The Manage Users window expands to show identification, status and permission fields for the user selected.
5. Click the **drop down** arrow for **Status** and select **Terminated**, as shown in **Figure 8-14** below.
6. Click the **Update** button. The online portal saves the changes and refreshes the window.

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Edit User

* First Name: * Last Name:

* Email Address:

Status: **Terminated** (dropdown menu open showing 'Activated' and 'Terminated')

Select at least one role:

☐ Select All

☒ R2 - Trading Partner Maintenance

☒ R4 - Claims Submissions

☒ R6 - Finance

☒ R8 - Utilization Management

☐ R1 - Provider Enrollment

☒ R3 - X12 Submissions

☒ R5 - Eligibility

☒ R7 - User Management

☒ R9 - Alerts and Subscriptions

Update (highlighted) Cancel

Figure 8-14: Status Field Drop Down

7. The **Status** field now displays **Terminated**, as shown in **Figure 8-15** below.

Manage Users

Registered users for this trading partner account are displayed below. Invite additional users by selecting 'Add User'. Existing users may be edited, deactivated or reactivated by clicking on the rows. You must have security role 'R7-User Management' to use these features.

[Add User](#)

First Name	Last Name	Email Address	R1	R2	R3	R4	R5	R6	R7	R8	R9	Status
New	User	new.user@domainname.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Terminated
Peter	R. Ovider	p.r.ovidier@domainname.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Activated

Page: 1 of 1 Go Page size: 2 Change Item 1 to 2 of 2

Figure 8-15: Updated Status Field